



COMMONWEALTH BUREAU OF CENSUS AND STATISTICS

QUARTERLY BUSINESS SURVEY No. 24. PRELIMINARY RESULTS.

INTRODUCTION

In Quarterly Business Survey No. 24 which was made during the second quarter of 1953, particulars were sought as to the amount of labour turnover during March, 1953, and as to the value of stocks of goods held. The report is divided into two parts:

Part A - Labour Turnover,
and Part B - Value of Stocks of Goods.

The estimates given below are based on the replies received, and they cover private businesses subject to payroll tax as it existed prior to September 1953, except those businesses in rural industries. The figures are based on returns from employers with approximately 25 per cent of all employees in private industry. Rural industries, governments, most governmental business undertakings, and small firms not subject to payroll tax are excluded.

PART A - LABOUR TURNOVER

Labour turnover is frequently measured by the number of engagements or separations (whichever is the lower) expressed as a percentage of average employment during the period under review. Table 1 below shows figures of both engagements and separations expressed as percentages in this way, the results of the latest survey being compared with those of similar surveys carried out in 1949, 1950 and 1952. "Separations" include dismissals and retrenchments as well as numbers of persons who leave of their own volition, and a dissection of the total into these classes is shown later in this report.

The period covered in individual returns was not uniform, depending as it did on the dates on which the February and March payroll tax returns of individual businesses were made up. The figures should be interpreted as applying to an average period of about $4\frac{1}{2}$ weeks. In comparing the turnover in different industries the possible effect of seasonal fluctuations should be kept in mind, but these should not seriously affect comparisons with earlier years within the same industry group.

TABLE 1 : LABOUR TURNOVER, MARCH, 1949, 1950, 1952 AND 1953

(Engagements and separations as percentage of average number of employees in each group)

			Manufacturing		Other Industries		All Industries	
			Manual Workers	Other Workers	Manual Workers	Other Workers	Manual Workers	Other Workers
			%	%	(a) %	(a) %	(a) %	(a) %
<u>MALES</u>								
Engagements:								
1949	..	..	9.3	1.8	8.1	3.5	8.9	3.0
1950	..	..	8.4	2.2	7.3	2.8	8.0	2.6
1952	..	..	6.0	1.9	6.5	2.6	6.2	2.4
1953	..	..	4.7	1.6	4.8	2.1	4.8	1.9
Separations:								
1949	..	..	8.5	1.4	7.1	2.8	8.0	2.3
1950	..	..	8.7	1.6	7.5	2.4	8.3	2.1
1952	..	..	7.0	1.9	6.9	2.6	7.0	2.4
1953	..	..	4.2	1.6	4.2	2.7	4.2	2.3

TABLE 1 : LABOUR TURNOVER, MARCH, 1949, 1950, 1952 AND 1953 (CONT'D.)

	Manufacturing		Other Industries		All Industries	
	Manual Workers	Other Workers	Manual Workers	Other Workers	Manual Workers	Other Workers
	%	%	(a) %	(a) %	(a) %	(a) %
FEMALES						
Engagements:						
1949	11.0	3.9	9.8	9.9	10.7	8.5
1950	10.5	4.8	12.1	5.8	11.0	5.6
1952	6.4	4.0	8.1	5.5	6.8	5.1
1953	9.0	4.0	7.3	5.8	8.5	5.4
Separations:						
1949	8.9	3.4	9.4	8.2	9.0	7.1
1950	8.6	4.4	11.0	5.7	9.3	5.3
1952	9.7	4.2	9.9	5.8	9.7	5.4
1953	6.1	3.2	4.9	4.6	5.8	4.3

(a) Excludes shipping and stevedoring.

Earlier surveys suggested that there was little change in rates of labour turnover between March, 1949 and March, 1950. Between March, 1950 and March, 1952 the engagement and separation rates fell in nearly all groups of manual workers, and they continued to fall rapidly between March, 1952 and March, 1953. For female manual workers engaged in manufacturing industry the separation rate rose from 8.6 per cent to 9.7 per cent between March, 1950 and March, 1952. The cause of the high separation rate in March, 1952 was in large part that employment was declining, particularly in the textile and clothing industries, and retrenchments were consequently high. By March, 1953, however, employment in those industries was again increasing and the engagement rate rose to 9.0 per cent, while lower retrenchments led to a fall in the separation rate from 9.7 per cent to 6.1 per cent. In all industries the turnover rates for non-manual workers are much less than for manual workers; the only important change for these workers was a fall in the separation rate for females between March, 1952 and March, 1953.

Table 2 shows separation rates for manual workers in individual industries.

TABLE 2 - PERCENTAGE SEPARATIONS FOR MANUAL WORKERS BY INDUSTRY, 1949-1953

(Percentage of average number of employees : month of March)

	MALES				FEMALES			
	1949	1950	1952	1953	1949	1950	1952	1953
Manufacturing -								
Engineering, metal working and vehicle building ..	8.1	7.4	6.3	4.2	11.6	12.1	10.8	4.9
Textiles	9.1	9.2	9.1	2.5	9.1	7.1	9.0	3.8
Clothing	5.0	6.3	8.5	3.9	5.0	5.8	9.5	6.0
Food, drink, tobacco ..	10.2	13.0	8.8	6.3	21.7	13.7	9.2	10.4
Furniture, sawmilling and wood-working	11.6	9.9	7.0	3.5	(c)	(c)	(c)	(c)
Paper, printing	4.5	4.8	3.8	1.3	6.6	9.3	10.4	3.8
Other manufacturing ..	8.3	8.5	7.7	3.8	7.5	13.2	10.5	5.1
All Manufacturing:	8.5	8.7	7.0	4.2	8.9	8.6	9.7	6.1
Mining	3.4	4.1	2.7	1.9	(b)	(b)	(b)	(b)
Building	10.7	8.4	10.9	6.4	(b)	(b)	(b)	(b)
Road Transport	6.7	7.4	4.1	4.1	(b)	(b)	(b)	(b)
Wholesale Trade	5.6	8.1	5.4	4.7	4.9	6.7	5.4	4.4
Retail Trade	5.1	5.6	4.8	2.7	5.5	6.3	7.9	2.8
All Other (a)	9.6	10.4	9.7	3.7	11.1	13.4	11.4	5.9
All Industries (a)	8.0	8.3	7.0	4.2	9.0	9.3	9.7	5.8

(a) Excludes shipping and stevedoring.

(b) Included with "all other".

(c) Included with "other manufacturing".

Between March, 1952 and March, 1953 the separation rate among male manual workers fell substantially in all manufacturing industries. In the four years for which figures have been collected the food, drink and tobacco manufacturing industry has had one of the highest separation rates in the manufacturing group, no doubt caused in large measure by seasonal retrenchments. Separation rates for males in the paper and printing industry have consistently been the lowest in the manufacturing group. In the non-manufacturing group there was little change in the turnover in road transport or wholesale trade between March, 1952 and March, 1953, but marked falls occurred in the other groups.

In most industries the turnover for females is higher than the corresponding rate for males, but otherwise the female rates follow the same general pattern as the male rates. Between 1952 and 1953 the separation rate for female manual workers fell in all industries except food, drink and tobacco manufacturing where the rate rose slightly.

Separation Rates by Class of Separation

In these Surveys separations have been classified by type of separation (dismissed, retrenched, left and others). Businesses submitting returns have been asked to class employees as "dismissed" where employment was terminated on the employer's initiative for disciplinary or similar reasons; as "retrenched" where employment was terminated, permanently or otherwise, on the employer's initiative for reasons such as reduction in the scale of operations, breakdown in machinery, shortage of materials, etc.; as "left" where employment was terminated on the employee's initiative; and as "other" where the separation was due to death, injury, permanent retirement (including women leaving to be married), enlistment in the forces or other reasons.

Table 3 shows for male and female manual workers an analysis of the separations in March, 1952, and March, 1953, in the main industry groups. Similar information for March, 1950, can be obtained from the report on Survey No. 20.

TABLE 3 - ANALYSIS OF SEPARATIONS FOR MANUAL WORKERS, MARCH, 1952 AND MARCH, 1953
(Percentage of average employment in each group)

	MARCH, 1952					MARCH, 1953				
	D.	R.	L.	O.	Total	D.	R.	L.	O.	Total
<u>MALES</u>										
Manufacturing:	%	%	%	%	%	%	%	%	%	%
Engineering, vehicles, etc.	0.8	1.3	4.1	0.1	6.3	0.6	1.0	2.5	0.1	4.2
Textile	1.5	4.2	3.3	0.1	9.1	0.3	0.2	1.9	0.1	2.5
Clothing	3.0	1.5	3.9	0.1	8.5	0.5	0.3	3.0	0.1	3.9
Food, drink, tobacco ..	1.1	3.2	4.4	0.1	8.8	0.6	4.1	1.5	0.1	6.3
Furniture, wood-working	0.8	1.2	5.0	-	7.0	0.5	0.5	2.3	0.2	3.5
Paper, printing	0.6	0.2	3.0	-	3.8	0.1	0.2	0.9	0.1	1.3
Other Manufacturing ..	1.6	1.2	4.8	0.1	7.7	0.7	0.9	2.1	0.1	3.8
All Manufacturing	1.1	1.6	4.2	0.1	7.0	0.6	1.3	2.2	0.1	4.2
Mining	0.1	0.1	2.3	0.2	2.7	0.1	-	1.6	0.2	1.9
Building	1.9	1.7	7.3	-	10.9	1.7	1.0	3.7	-	6.4
Road Transport	0.7	0.8	2.6	-	4.1	0.5	0.3	3.0	0.3	4.1
Wholesale and Retail Trade	0.7	1.2	3.2	0.1	5.2	0.6	1.0	2.2	0.2	4.0
Other Industries	2.0	1.9	5.4	0.4	9.7	0.8	0.4	1.8	0.7	3.7
All Industries	1.1	1.5	4.3	0.1	7.0	0.6	1.1	2.3	0.2	4.2
<u>FEMALES</u>										
Manufacturing:	%	%	%	%	%	%	%	%	%	%
Engineering, vehicles, etc.	0.3	6.1	4.3	0.1	10.8	0.5	0.7	3.6	0.1	4.9
Textile	1.0	4.7	3.2	0.1	9.0	0.3	0.1	3.2	0.2	3.8
Clothing	1.5	4.5	3.1	0.4	9.5	1.8	0.4	3.4	0.4	6.0
Food, drink, tobacco ..	1.1	2.5	5.1	0.5	9.2	0.7	4.8	4.8	0.1	10.4
Paper, printing	-	1.9	7.9	0.6	10.4	0.4	0.5	2.7	0.2	3.8
Other Manufacturing ..	0.3	4.0	6.1	0.1	10.5	1.0	0.4	3.7	-	5.1
All Manufacturing ..	1.1	4.1	4.2	0.3	9.7	1.1	1.2	3.6	0.2	6.1
Wholesale and Retail Trade	0.6	2.3	3.8	0.1	6.8	0.8	0.6	1.6	0.3	3.3
Other Industries	2.4	0.2	8.3	0.5	11.4	1.2	-	4.7	-	5.9
All Industries	1.2	3.3	4.9	0.3	9.7	1.1	0.9	3.6	0.2	5.8

(D. Dismissed; R. Retrenched; L. Left; O. Other Reasons)

Between March, 1952 and March, 1953, the percentage of male manual employees who left jobs of their own accord fell in all industries except the road transport industry. The percentage of employees dismissed or retrenched fell in all industries except food, drink and tobacco manufacturing, the greatest declines being in the textile and clothing industries and in the "other industries" group. Similarly the percentage of female manual workers retrenched or dismissed fell in all industries except food, drink and tobacco manufacturing, but the decline in the percentage of employees who left of their own accord was smaller and less widespread than among males.

Length of Service of Leavers

The following table shows the length of service of manual workers who left on their own initiative in March, 1950 and March, 1953. The number of persons who left after the stated periods of service are expressed as a percentage of average male or female employment in each industry.

**TABLE 4 - LENGTH OF SERVICE OF MANUAL WORKERS WHO LEFT JOBS, MARCH, 1950
AND MARCH, 1953**

(Number of "leavers" as a percentage of average employment in each industry)

	1950					1953				
	0-1 month	1-3 mths	3-12 mths	Over 12 mths	Total	0-1 month	1-3 mths	3-12 mths	Over 12 mths	Total
MALES										
Manufacturing:	%	%	%	%	%	%	%	%	%	%
Engineering, vehicles	1.9	1.6	1.4	1.7	6.6	0.6	0.5	0.7	0.7	2.5
Textile ..	2.7	1.5	1.7	2.6	8.5	0.5	0.3	0.7	0.4	1.9
Clothing ..	1.2	1.0	1.3	1.3	4.8	0.5	0.4	1.4	0.7	3.0
Food, drink, tobacco	2.6	3.5	1.0	2.3	9.4	0.5	0.3	0.4	0.3	1.5
Furniture, woodworking	3.6	2.5	1.6	1.7	9.4	0.5	0.3	0.7	0.8	2.3
Paper, printing	1.7	0.8	0.9	0.8	4.2	0.1	0.2	0.2	0.4	0.9
Other manufacturing	2.9	1.5	1.8	1.2	7.4	0.5	0.6	0.4	0.6	2.1
All Manufacturing	2.3	1.9	1.4	1.7	7.3	0.5	0.4	0.7	0.6	2.2
Mining ..	0.5	0.7	1.0	1.8	4.0	0.2	0.3	0.4	0.7	1.6
Building ..	3.1	1.6	0.8	1.1	6.6	1.1	0.6	1.3	0.7	3.7
Road Transport	1.3	0.9	2.2	1.9	6.3	0.3	0.6	1.0	1.1	3.0
Wholesale and Retail										
Trade ..	1.7	0.7	1.1	1.4	4.9	0.7	0.4	0.7	0.4	2.2
Other Industries	2.1	1.4	2.1	2.0	7.6	0.4	0.3	0.6	0.5	1.8
All Industries	2.2	1.6	1.4	1.6	6.8	0.6	0.4	0.7	0.6	2.3
FEMALES										
Manufacturing:	%	%	%	%	%	%	%	%	%	%
Engineering, vehicles	3.2	3.3	2.3	1.6	10.4	0.9	1.2	0.8	0.7	3.6
Textile ..	1.8	1.0	2.0	1.7	6.5	0.7	0.8	1.0	0.7	3.2
Clothing ..	0.8	0.8	1.5	2.1	5.2	0.7	0.4	0.9	1.4	3.4
Food, drink, tobacco	4.1	2.6	1.9	0.9	9.5	1.8	1.8	0.6	0.6	4.8
Other manufacturing	3.5	2.4	2.6	1.7	10.2	0.7	0.3	1.0	1.3	3.3
All Manufacturing	2.0	1.6	1.9	1.7	7.2	0.9	0.8	0.9	1.0	3.6
Wholesale and Retail										
Trade ..	0.6	0.7	0.9	2.5	4.7	0.4	0.1	0.4	0.7	1.6
Other Industries	2.5	4.5	0.8	2.7	10.5	1.9	0.8	0.9	1.1	4.7
All Industries	1.9	1.8	1.6	1.9	7.2	1.0	0.7	0.8	1.1	3.6

Between 1950 and 1953, when the overall percentage of leavers fell considerably, this fall was concentrated more than proportionately on the group with a very short period of service. 56 per cent of male manual workers who left jobs in March, 1950 had less than three months service, whereas in March, 1953 only 43 per cent of them had less than three months service. For female manual workers, although experience varied considerably between industries, on the average over all industries there was a much smaller change in the relative distribution of leavers by length of service than for males.

PART B - VALUE OF STOCKS OF GOODS

The following table shows the estimated total book value of stocks of goods held by those private manufacturing and trading businesses which are subject to payroll tax. Businesses which are not subject to payroll tax, including small businesses with a payroll below the exemption limit and family businesses not employing labour, are excluded. The figures asked for were the value of stocks as used for balance sheet purposes, or, for dates other than the annual balancing date, the estimated value of stocks of all kinds which are normally included in the valuation for balance sheet purposes. The figures therefore include the value of stocks of all kinds - fuel, raw materials, goods in process and finished goods.

BOOK VALUE OF STOCKS OF GOODS HELD BY MANUFACTURERS AND TRADERS

1946 TO MARCH, 1953

	As at annual balancing dates in the year ended September							Sept. 1952	March 1953
	1946	1947	1948	1949	1950	1951	1952		
	£m.	£m.	£m.	£m.	£m.	£m.	£m.	£m.	£m.
Engineering, vehicles	81	95	115	140	175	235	325	315	292
Textiles, clothing	34	39	50	66	75	111	114	103	90
Food, drink, tobacco	44	53	60	68	75	99	132	133	147
Other manufacturing	58	73	97	112	120	156	224	219	192
All manufacturing	217	260	322	386	445	601	795	770	721
Wholesale Trading	59	88	121	145	180	220	327	301	278
Retail Trading	55	75	91	102	115	153	173	170	149
TOTAL:	331	423	534	633	740	974	1,295	1,241	1,148

Between the 1952 balancing dates and September, 1952, the total value of stocks held by manufacturers and traders fell by £54m., and between September, 1952 and March, 1953 it fell by another £93m.

Between September, 1952 and March, 1953 the value of stocks held by manufacturers alone fell by £49m. Stocks rose by £14m. in the food, drink and tobacco manufacturing industry, but declines in the other three manufacturing groups. The smallest relative fall was in the engineering and vehicles industry in which the value of stocks fell by 6 per cent, compared with about 12 per cent in the other manufacturing industries.

There was a greater relative fall in the value of traders' stocks than in the value of manufacturers' stocks, since traders' stocks fell by 15 per cent between the 1952 balancing dates and March, 1953, while manufacturers' stocks fell by 9 per cent.

Between the 1952 balancing dates and September, 1952 there had been a substantial fall in the value of wholesalers' stocks but practically no change in retailers' stocks. Between September, 1952 and March, 1953, however, retailers' stocks fell more rapidly than wholesalers' stocks, so that over the whole period from the 1952 balancing dates to March, 1953 the decline in both groups was about 15 per cent.

COMMONWEALTH BUREAU OF CENSUS AND STATISTICS

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6TH JANUARY, 1954